

ENERGY STAR® Program Requirements

Home Upgrade Service Provider

Partner Commitments

Eligible Organizations

Companies, operating on their own behalf, or community-based organizations, that provide energy efficiency home upgrade concierge services for single-family or multi-family residences, offering some or all the measures in an ENERGY STAR Home Upgrade, and promote those measures in the context of the value of an ENERGY STAR Home Upgrade. This includes companies/organizations that assess and identify homes for relevant upgrades and facilitate or perform the installations of ENERGY STAR certified equipment; however, traditional HVAC contractors, water heater or window installers, and insulation contractors are not eligible.

NOTE: Eligible organizations that implement federal residential upgrade programs such as WAP and LIHEAP can leverage existing reporting and planning documents to fulfill relevant partner commitment obligations.

Commitments

The following are the terms of the ENERGY STAR Partnership Agreement as it pertains to ENERGY STAR Home Upgrade Service Providers. The ENERGY STAR PARTNER must adhere to the following program requirements:

Branding:

- 1) comply with current ENERGY STAR Logo Use Guidelines, describing how the ENERGY STAR labels and name may be used. PARTNER is responsible for adhering to these guidelines and for ensuring that its authorized representatives, such as advertising agencies, are also in compliance;
- 2) promote ENERGY STAR brand awareness and the ENERGY STAR Home Upgrade as a desirable way for customers to help protect the environment and save on energy bills;
- 3) use the ENERGY STAR Home Upgrade, in a manner consistent with the national ENERGY STAR efforts, as a platform to promote upgrades to highly efficient, ENERGY STAR certified products/equipment;

Note: The ENERGY STAR mark may not be used to indicate or imply that an ENERGY STAR Home Upgrade results in an ENERGY STAR certified home;

Good Business Practices:

- 4) implement Quality Control procedures and/or a Quality Management System to ensure that project objectives are fully achieved and in a healthy and safe manner, including but not limited to:
 - maintain a clear process for conflict resolution for issues that may arise during or post-installation,
 - provide clear disclosures about expected impacts of upgrades on utility bills
 - provide equipment maintenance guidance;
- 5) ensure terms and conditions of any financing, whether offered directly or in conjunction with an affiliate partner, are transparent and clear and avoid practices that would be considered unfair or abusive by the Consumer Financial Protection Bureau
 - prioritize offering options that reduce financing burden, such as tax credits, rebates, no cost assistance programs, zero or low interest loans, interest rate buy downs through state, federal, utility sources, Community Development Financial Institutions, Greenbanks etc.

Note: the ENERGY STAR name and mark may not be associated in any way with any financing offered directly or in conjunction with an affiliate partner;

Serving Low to Moderate Income Households¹:

- 6) ensure ENERGY STAR Home Upgrade services include features designed to increase access among low income/disadvantaged households. Particularly desirable are service companies that successfully leverage available funding sources and programs to eliminate up-front costs, ensure long-term affordability, and address other barriers to home upgrades for low to moderate income customers. Funding sources to consider leveraging include but are not limited to:
 - programs administered through community-based organizations that are specifically designed to address the critical needs of disadvantaged households like health and safety assistance,
 - other non-debt-based federal, state, local or utility programs such as those administered through Health and Human Services (HHS), e.g. LIHEAP, Federal Emergency Management Agency (FEMA), High Efficiency Electrification Rebates (HEERA) and Weatherization Assistance Program (WAP), and others from the Department of Energy, and programs from local utility companies, such as no-cost income eligible programs, inclusive utility investment programs with strong consumer protections and efficiency rebates;

Installer Qualifications:

- 7) ensure installer staff or sub-contractors have the following qualifications (or are approved to perform work based on guidelines for DOE's Weatherization Assistance Program):
 - licensed to perform work at the location,
 - maintain liability insurance,
 - are trained and certified by an outside organization (such as BPI, RESNET, or organizations that provide specialized training and are subject to EPA review) to perform services and install products associated with ENERGY STAR Home Upgrade, and
 - participate in continuing education professional credit or training programs;

Coordination and Reporting:

- 8) develop and submit, within three months of agreement activation, a program plan outlining the PARTNER's intended approach to integrating ENERGY STAR Home Upgrade into its service offerings, including which measures will be addressed, what markets the service will be offered in, and marketing and promotion strategies for key audiences such as contractors, consumers, distributors, retailers, and utilities;
- 9) submit all marketing materials and template designs on an ongoing basis developed for PARTNER's ENERGY STAR Home Upgrade promotions to ENERGY STAR for review to ensure accuracy of ENERGY STAR logo use and consistency of the ENERGY STAR message. PARTNER will allow a minimum of five full working days for ENERGY STAR to review and approve marketing templates;
- 10) provide an annual accounting of the number of homes serviced that received one or more of the designated upgrades, the types of measures installed, and other relevant information. The data for each calendar year should be submitted to EPA no later than the following March. The data will be used by EPA only for program evaluation purposes and will be closely controlled. Any information used will be masked by EPA so as to protect the confidentiality of the PARTNER;
- 11) upon request, provide EPA with relevant documents regarding elements of commitment;
- 12) notify EPA of a change in the designated responsible party or contacts within 30 days.

¹ For the purpose of this agreement low to moderate income and disadvantaged is defined by the White House Council on Environmental Quality [Climate and Economic Justice Screening Tool \(CEJST\)](#),